



CASE BASICS

An Introduction to CASE and the
Crazy World of Advancement
Dan C. Peterson, J.D.

My CASE Story

- 25 years in advancement at three CASE VIII schools
 - Athletic fund raising
 - Regional major gifts officer
 - Gift planning
 - Campaign planning
- Attended my first CASE VIII district conference in 1983/84 as an intern!
- CASE Summer Institute on Fund Raising in 1985
- Numerous CASE “sme” programs
- Co-chair, 1990 CASE VIII District Conference
- 4-time District Conference speaker



What is CASE?

The Council for Advancement in Support of Education

- international membership association for educational Advancement professionals
- advances and supports educational institutions
- provides knowledge, standards, advocacy and training
- designed to strengthen the combined efforts of alumni relations, communications, fundraising, marketing and allied professionals.

What is “advancement?”

A strategic, integrated method of managing relationships

Core disciplines:

- Secure private financial support from potential donors
- Engage alumni in the life of the institution as volunteers, advocates and supporters
- Promote or market the institution
- Communicate about the institution with those who have a stake in its success

Why get involved in CASE?

What do YOU think?

Why get involved in CASE?

Advance your institution

- Baseline research
- Best practices
- Benchmark your program
- In a pickle?
 - CASE buddies!
 - Learn from the best - Crystal Apple honorees



“We have greatly benefitted from CASE’s materials and training, and I know our development program will become stronger as our relationship with CASE grows.”

Jeong-Bae Park — *Director, Office of Development*
Korea University—Seoul
South Korea



About CASE

Education’s leading resource for knowledge, standards, advocacy and training in alumni relations, communications, fundraising, marketing and related activities.

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Featured Product



Major Gifts: Solicitation Strategies, 3rd edition

Softcover.
Item: 29701

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Independent Schools Awards



Highlights

CASE Announces Winners of Prestigious 2011 Independent Schools Awards
Three individuals and one foundation were selected for their commitment and service to primary and secondary independent school education.

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e-Headlines

Feb. 10, 2011

[RSS](#)

- [Community colleges relying more on tuition](#)
- [Fears for Belarusian academic freedom](#)
- [Egypt: Alternatives sought as universities close](#)

E-Newsletter



Check Out the January 2011 BriefCASE

The issue includes articles on the results of the CASE Fundraising Index, Independent Schools Award winners, and expert predictions for the top social media trends of

Featured Conference



Workshop for Newcomers in Development: Spring Session

March 8–10, 2011
Providence, R.I.

[> Conference Details](#)
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Find answers to frequently asked questions.

The New CASE Web Site

You knew just where it was on the old CASE Web site, but how do you find it now? [Check here.](#)

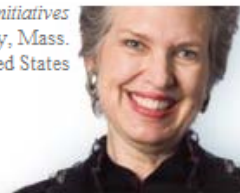
CASE InfoCenter & Advancement Questions

If you're a CASE Professional Member, contact the [CASE InfoCenter](#) for help with your questions about alumni relations, communications, fundraising, marketing and more.





Patricia Vandenberg — *Executive Director of Communications and Strategic Initiatives*
Mount Holyoke College — South Hadley, Mass.
United States



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Personal service. Targeted information. Shared knowledge.

The InfoCenter is a hub for resources about the advancement field. Our four-person staff of professional librarians is highly knowledgeable about CASE products and services as well as other print and online resources for advancement professionals.

We provide the following for all CASE members:

- [Online samples](#), including endowment policies, gift agreements, gift fee policies, job descriptions, MOUs, social media policies, and more
- [Good Question Archive](#), a new collection of questions posed to the InfoCenter by CASE Professional Members, along with the InfoCenter's responses
- [CASE Files](#) that contain information on topics the InfoCenter tracks
- A searchable [Directory of Continuing and Graduate Education for Advancement Professionals](#)

CASE Professional Members receive additional, premium services:

- [Ask the InfoCenter](#) for personalized responses to advancement questions
- [Print samples](#), including award-winning material from the [CASE Circle of Excellence Awards Program](#), mailed upon request

Why get involved in CASE?

Advance Your Career

- Subject Matter Expert
- Regional, national & international perspectives
- Know your professional responsibilities
- Build your network

Why get involved in CASE?

Give Back

- Volunteer
- Mentor

Navigating this Conference

Be Fearless!

Short term pain; long term gain!

- Network, network, network!
- Meet the vendors - you can learn from them!
- Stretch your knowledge boundaries

YOU Are CASE's Future

Establish Your Own Professionalism

- Maintain your duty of loyalty to your institution
- Maintain ethics and integrity
- Soak up this conference - and every other learning opportunity
- Build your CASE buddies roll-a-dex
- Get involved with CASE
- Give back to CASE someday